

# Change Management Policy

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## Introduction

Information technology infrastructure is critical to the effective operation of Montana courts. The Court Technology Program strives to continually maintain and improve this vital resource. However, as our infrastructure has grown, it has become more complex. As our interdependencies – between systems, between people, and between people and systems – continues to grow, it is essential that we carefully manage changes to the infrastructure. Even the most well-intentioned change can cause unexpected hardship to technology users if the implications of the change are not mapped out in advance.

## Purpose

The purpose of the Change Management Policy is to manage changes in a rational and predictable manner so that court personnel and information technology staff can plan accordingly. Changes require serious forethought, careful monitoring, and follow-up evaluation to reduce negative impact to the user community and to increase the value of the information technology infrastructure. The purpose of this policy is not to frustrate change or to question the rationale of changes. Rather, it is to make sure that changes have their intended impact while avoiding unintended consequences.

## Scope

This policy covers all changes to the Courts of Limited Jurisdiction build of the FullCourt case management system. This includes modification to existing standard tables, changes to FullCourt forms, and processes, and deployment of any vendor-driven enhancements to FullCourt.

## Change Management Group

The Automation Committee of the Commission on Courts of Limited Jurisdiction and the IT Director of the Office of the Court Administrator's Office are the "change management group".

The change management group will:

1. Meet regularly to review all requests for changes to the COLJ build of the FullCourt program.
2. Will prioritize changes based on a careful analysis of cost, scope and criticality.
3. Will communicate to all stakeholders critical information about how a given change will impact their work.
4. For critical application changes the group will establish testing and approval criteria in advance of making the change to FullCourt.
5. The group will be responsible for properly documenting all changes and will be accountable for all changes. The group will maintain a change log that documents all requests for change, plans and scheduling for the change, and outcomes.

## Change Management Process

The change management process will include the following steps. Each of these steps must be completed for every change.

1. **Requestor fills out change management form.** The form includes space for a detailed description of the proposed change. Changes requests should be e-mailed to: [judithelpdesk@mt.gov](mailto:judithelpdesk@mt.gov).
2. **The change management group reviews and approves the change.** At its regular meeting the change management group will review the Request for Change. The group will evaluate the requestor's proposal in light of their knowledge of business processes, and interdependencies.
3. **The change management group assigns responsibility for making the change.** If the request is approved, the change management group will assign responsibility for making the change to qualified personnel. They will establish specifications and testing requirements depending on the nature of the change.
4. **The change management group will communicate with stakeholders.** The change management group will make sure that all stakeholders are aware of the nature and potential impact of the proposed change. Changes and change status will be posted on the Judicial Branch's web site: [www.courts.mt.gov](http://www.courts.mt.gov)
5. **The change management group will track progress on the proposed changes and have final approval.** Personnel tasked with working on the change will report back to the group regarding progress on planning and testing. When the proposed change has been tested, and appropriate fallback has been planned in case of a problem, the group will approve the change. They will schedule the change – if it requires time outside of regular maintenance cycles – and will communicate with stakeholders.
6. **The change management group will perform a follow-up on all changes.** At their regular change management meetings, the change management group will perform post-mortems on all changes. Successful changes, as well as reasons why a change did not go through as planned, and lessons learned from the experience will be included in the change log.

## Regular Maintenance Cycles

It is the goal of the Change Management Group to limit the number of new releases of the FullCourt case management system to two releases per year. The target release dates would be May and October of each year. Consequently, all changes for release in May would need to be identified by February and changes for the October release would need to be identified by August of each year.

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